



COUNTY OF SAN DIEGO
Great Government Through the General Management System – Quality, Timeliness, Value
DEPARTMENT OF HUMAN RESOURCES

CLASS SPECIFICATION

CLASSIFIED

RETIREMENT PERFORMANCE AUDITOR

Class No. 007554

■ CLASSIFICATION PURPOSE

To plan, lead and conduct difficult and complex performance audits and studies of functions and programs for all divisions of the San Diego County Employees Retirement Association (SDCERA); and to perform related work as required.

■ DISTINGUISHING CHARACTERISTICS

Retirement Performance Auditor is a management class position. Under the general direction of the Retirement Chief Executive Officer, this class is responsible for conducting performance audits, benchmark comparisons, process improvement/reengineering studies and preparing reports on findings and recommendations for SDCERA. The incumbent in this classification is responsible for handling confidential retirement personnel and/or employment transactions.

■ FUNCTIONS

The examples of essential functions listed in the class specification(s) are representative but not necessarily exhaustive or descriptive of any one position in the class(es). Management is not precluded from assigning other related functions not listed herein if such functions are a logical assignment for the position.

Essential Functions:

1. Audits functions and activities of SDCERA divisions and programs to determine efficiency and effectiveness.
2. Participates in the preparation of audit programs.
3. Collects and analyzes data.
4. Prepares written reports on findings and makes recommendations.
5. Conducts oral and visual presentations.
6. Analyzes and reviews policies and procedures related to member services, administration, investments, finance, information technology, and benefit administration at SDCERA.
7. Identifies potential performance audit areas.
8. Participates in periodic audit planning meetings.
9. Monitors audit progress.
10. Plans and directs audit surveys.
11. Testifies on specific performance audit matters to the Retirement Board and Retirement Chief Executive Officer.
12. Ensures completeness and quality of work adheres to performance audit standards.
13. Provides courteous, high quality service to members of the public by personally responding to requests for service or appropriate referral.

■ KNOWLEDGE, SKILLS AND ABILITIES

Knowledge of:

- Professional auditing standards recognized by the Institute of Internal Auditors.
- Program evaluation, processes, and methods.
- Benchmarking techniques.
- Management principles and practices applicable to government functions, programs, and processes.
- Process improvement methodologies.

- Performance audit methodologies.
- Project management and quality assurance techniques.
- Policy and procedure formulation and implementation.
- The General Management System in principle and in practice.
- Telephone, office, and online etiquette.
- County customer service objectives and strategies.

Skills and Abilities to:

- Plan, direct and coordinate multiple audit projects.
- Manage specific project timelines.
- Communicate effectively, both orally and in writing.
- Establish and maintain effective working relationships with departments, special districts, and independent agencies.
- Interpret and apply legal and administrative codes to audit matters.
- Prepare clear and concise reports for executive management, public officials, investigative bodies, and the general public.
- Communicate effectively with a variety of individuals representing diverse cultures and backgrounds and function calmly in adverse situations, which require a high degree of sensitivity, tact and diplomacy.
- Treat County employees, representatives of outside agencies and members of the public with courtesy and respect.
- Assess the customer's immediate needs and ensure customer's receipt of needed services through personal service or referral.
- Provide prompt, efficient and responsive service.
- Exercise appropriate judgment in answering questions and releasing information; analyze and project consequences of decisions and/or recommendations.

■ EDUCATION/EXPERIENCE

Education, training, and/or experience that demonstrate possession of the knowledge, skills and abilities listed above. Examples of qualifying education/experience are:

1. A bachelor's degree from an accredited college or university in finance, business administration, public administration, political science or a related field, AND five (5) years of experience in performance, contract, or information systems auditing, OR
2. A master's degree from an accredited college or university in finance, business administration, public administration, political science or related field, AND three (3) years of experience in performance, contract, or information systems auditing.

Note: Possession of a Certified Public Accountant (C.P.A), Certified Internal Auditor (C.I.A.), or Certified Information Systems Auditor (C.I.S.A) certificate is desirable.

■ ESSENTIAL PHYSICAL CHARACTERISTICS

The physical characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of the classification(s). Reasonable accommodation may be made to enable an individual with qualified disabilities to perform the essential functions of a job, on a case-by-case basis.

Continuous upward and downward flexion of the neck. Frequent: standing, sitting, bending and stooping, twisting of waist, side-to-side turning of neck; fine finger dexterity to operate keyboards and writing materials.

■ SPECIAL NOTES, LICENSES, OR REQUIREMENTS

License

A valid California class C driver's license, which must be maintained throughout employment in this class, is required at time of appointment, or the ability to arrange necessary and timely transportation for field travel. Employees in this class may be required to use their own personal vehicle.

Working Conditions

Office environment; exposure to computer screens.

Background Investigation/Conflict of Interest

Must have a reputation for honesty and trustworthiness. Misdemeanor convictions may be disqualifying depending on number, severity, and recency. Applicants are subject to a background investigation. Individuals hired into this class are required to file a Conflict of Interest statement pursuant to Conflict of Interest Code adopted by County agencies and departments and approved by the Board of Supervisors. Such statement must be filed within thirty (30) days of hiring date.

Probationary Period

Incumbents appointed to permanent positions in this class shall serve a probationary period of 12 months (Civil Service Rule 4.2.5).

New: July 28, 2000
Reviewed: Spring 2003
Revised: April 9, 2004